

# pladis Biscuit Category Update

March 2026



# Biscuits Planograms

# Biscuits Planogram 1m x 6 shelf



|  |   |   |  |   |
|--|---|---|--|---|
| CADBURY FINGERS MILK CHOCOLATE 114 GM        | Cadbury Crunchy Melts Cookies Chocolate Centre 156g | McVitie's Signature Choc Caramel Round 109g             | TUNNOCKS TEACAKES MALLOW 23 GM 6 PACK      | Tunnock's Caramel Wafer Milk Choc 4pk                 |
| MCVITIES JAFFA CAKES 10PK                    | MCVT MLK CHOC DIGESTIVES 266g                       | McVitie's Digestives Dark Chocolate 266g                | McVitie's Digestives White Chocolate 232g  | MCVITIES CARAMEL DIGESTIVES 267G                      |
|  |   |   |  | MCVITIES CHOCOLATE HOBNOBS MILK CHOCOLATE 262 GM      |
| McVitie's Flipz Milk Choc                    | McVitie's Digestives Plain 366g                     | MCVITIES RICH TEA PLAIN 300 GM                          | MCVITIES GINGER NUTS 250GM                 | McVitie's Cookies The Chunky One White Choc Chip 150g |
| OREO COOKIES 154G                            | OREO DOUBLE STUF COOKIES VANILLA 157 GM             | Maryland Cookies Choc Chip 200g                         | LOTUS ORIGINAL CARAMELISED BISCUITS 250 GM |   |
|  |   |   |  |   |
| CADBURY TIME OUT MILK CHOCOLATE 16 GM 6 PACK | KIT KAT MILK CHOCOLATE 6x20.7g                      | MCVITIES CLUB ORANGE 6x22.5G                            | McVities Penguin Milk Chocolate 6x22g      | Jammie Dodgers Original 140g                          |
|  |   |   |  |   |
| Private Label - Bourbon Creams               | Private Label Custard Creams                        | KELLOGGS RICE KRISPIES SQUARES MARSHMALLOW 28 GM 4 PACK | Cadbury Brunch Chocolate Chip 5Pk 140G     | JACOBS CREAM CRACKERS PLAIN 300 GM                    |
|  |   |   |  | RITZ ORIGINAL CRACKERS 200G                           |

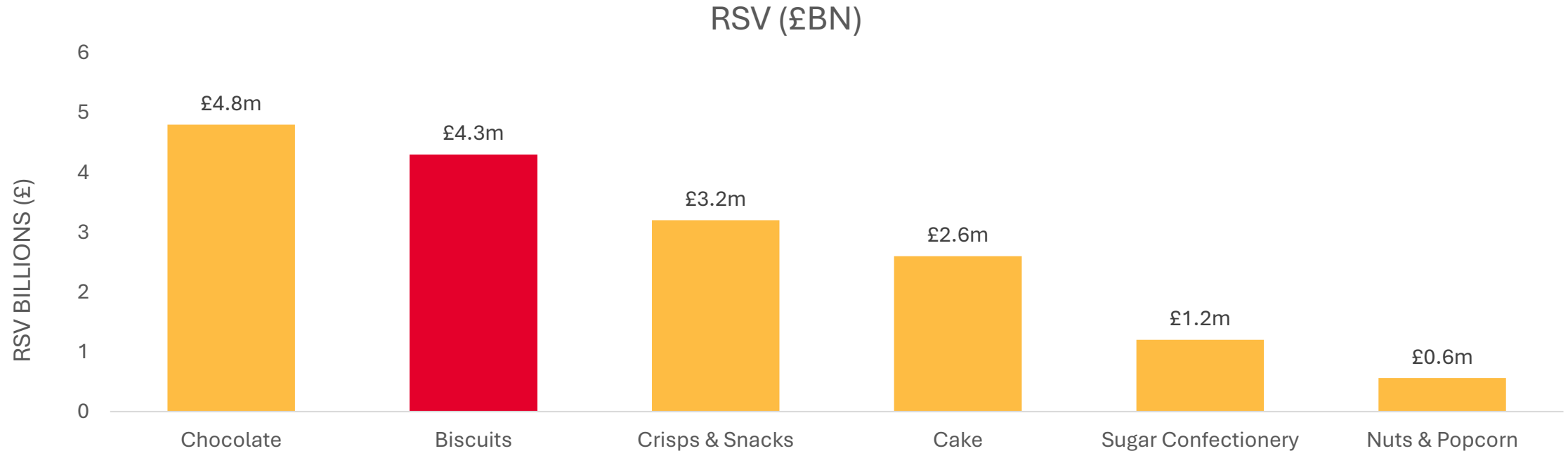
# Biscuits Planogram 2m x 6 shelf



|  |  |   |   |  |  |   |   |   |   |  |  |                                      |
|--|--|---|---|--|--|---|---|---|---|--|--|--------------------------------------|
| LU Le Petit<br>Chocolat<br>Biscuits 150g                 | CADBURY<br>FINGERS MILK<br>CHOCOLATE 114<br>GM | Cadbury<br>Crunchy Melts<br>Cookies<br>Chocolate<br>Centre 156g | McVitie's Signature<br>Choc Caramel<br>Round 109g                 | McVitie's Signature<br>Caramel Swirls 142g               | Fox's Fabulous<br>Chocolaty Milk<br>Chocolate Rounds<br>130g | Fox's Fabulous<br>Cookies<br>Half<br>Coated<br>Milk<br>Chocolat | Fox's<br>Milk<br>Choc<br>Chunk<br>Cookie<br>180g                    | Paterson's<br>Shortbread<br>Fingers<br>300g                                   | TUNNOCK'S<br>TEACAKES<br>MALLOW 23<br>GM 6 PACK | Tunnock's<br>Caramel<br>Wafer<br>Milk<br>Choc 4pk    |  |                                      |
| LU<br>NIKADO<br>MILK<br>CHOCOL<br>ATE<br>75 GM           | NUTE<br>la<br>Biscu<br>its16<br>6g             | McVitie's<br>Flipz Milk<br>Choc                                 | McVitie's<br>Flipz<br>Salted<br>Caramel                           | McVitie's<br>Flipz<br>Peanut<br>Butter<br>80g PMP        | MCVITIE'S JAFFA CAKES<br>10PK                                | MCVT MLK CHOC<br>DIGESTIVES 266g                                | McVitie's<br>Digestives<br>Dark<br>Chocolate<br>266g                | McVitie's<br>Digestives<br>White<br>Chocolate<br>232g                         | MCVITIE'S<br>CARAMEL<br>DIGESTIVES<br>267G      | McVitie's<br>Digestives<br>Gold<br>Chocolate<br>232g | MCVITIE'S<br>CHOCOLATE<br>HOBNOBS<br>MILK<br>CHOCOLATE<br>267 GM |                                      |
| Maryland Cookies<br>Swich-Choc<br>Creme Biscuits<br>150g | OREO COOKIES 154G                              | OREO DOUBLE<br>STUF COOKIES<br>VANILLA 157<br>GM                | FOX'S CRUNCH<br>CREAMS GOLDEN<br>230G                             | MCVITIE'S<br>CLUB<br>ORANGE<br>6X22.5G                   | MCVITIE'S<br>CLUB MINT 6<br>PACK                             | MCVITIE'S<br>GOLD BARS<br>6X22G                                 | McVitie's Penguin<br>Milk Chocolate<br>6x22g                        |   |   |  |  |                                      |
| Maryland Cookies<br>Choc Chip 200g                       | Maryland Cookies<br>Double Choc 200g           | McVitie's<br>Cookies The<br>Chunky One<br>Choc Chip 150g        | McVitie's<br>Cookies The<br>Chunky One<br>White Choc<br>Chip 150g | LOTUS<br>ORIGINAL<br>CARAMELISED<br>BISCUITS 250<br>GM   | KIT KAT MILK CHOCOLATE<br>6x20.7g                            |   | WAGON WHEELS<br>JAMMIE 38 GM 6<br>PACK                              |   |   |  |  |                                      |
| McVitie's Fruit<br>Shortcake<br>200G                     | MCVITIE'S<br>GINGER NUTS<br>250GM              | MCVITIE'S<br>HOBNOBS<br>PLAIN 300 GM                            | MCVITIE'S RICH<br>TEA PLAIN 300 GM                                | McVitie's<br>Digestives Plain<br>360g                    | Jammie Dodgers<br>Original 140g                              | Fox's Party Rings<br>125g                                       | KELLOGGS RICE<br>KRISPIES<br>SQUARES<br>MARSHMALLOW<br>28 GM 4 PACK | KELLOGGS RICE<br>KRISPIES<br>SQUARES<br>TOTALLY<br>CHOCOLATEY 36<br>GM 4 PACK |   |  |  |                                      |
| CUSTOMER<br>FAVOURITE                                    | CUSTOMER<br>FAVOURITE                          | OL Milk<br>Chocolate<br>Digestives                              | OL Milk<br>Chocolate<br>Digestives                                | BOURBON<br>CREAMS  | CUSTARD<br>CREAMS  | belVITA   | BRUNCH<br>BAR   | JACOBS<br>CREAM<br>CRACKERS PLAIN<br>300 GM                                   | Tuc Original<br>150G                            | TUC<br>Sandwich<br>150g                              | Jacobs<br>Cheddars<br>150G                                       | RITZ<br>ORIGINAL<br>CRACKERS<br>200G |
| RETAILER CHOICE 1  | Own Label Milk<br>Chocolate<br>Digestives      | Private<br>Label -<br>Bourbon<br>Creams                         | Private<br>Label<br>Custard<br>Creams                             | BELVITA<br>SOFT<br>BAKED<br>CHOC<br>CHIP 50<br>GM 5 PACK | Cadbury<br>Brunch<br>Chocolate<br>Chip 5Pk<br>140G           |   |   |   |   |  |  |                                      |

# Biscuits Category Advice

# Biscuits is £4.3bn category and has the highest penetration of all core snacking categories. It's purchased nearly once a week



**Biscuits Penetration 98.9%**  
*(highest penetration of all core snacking)*

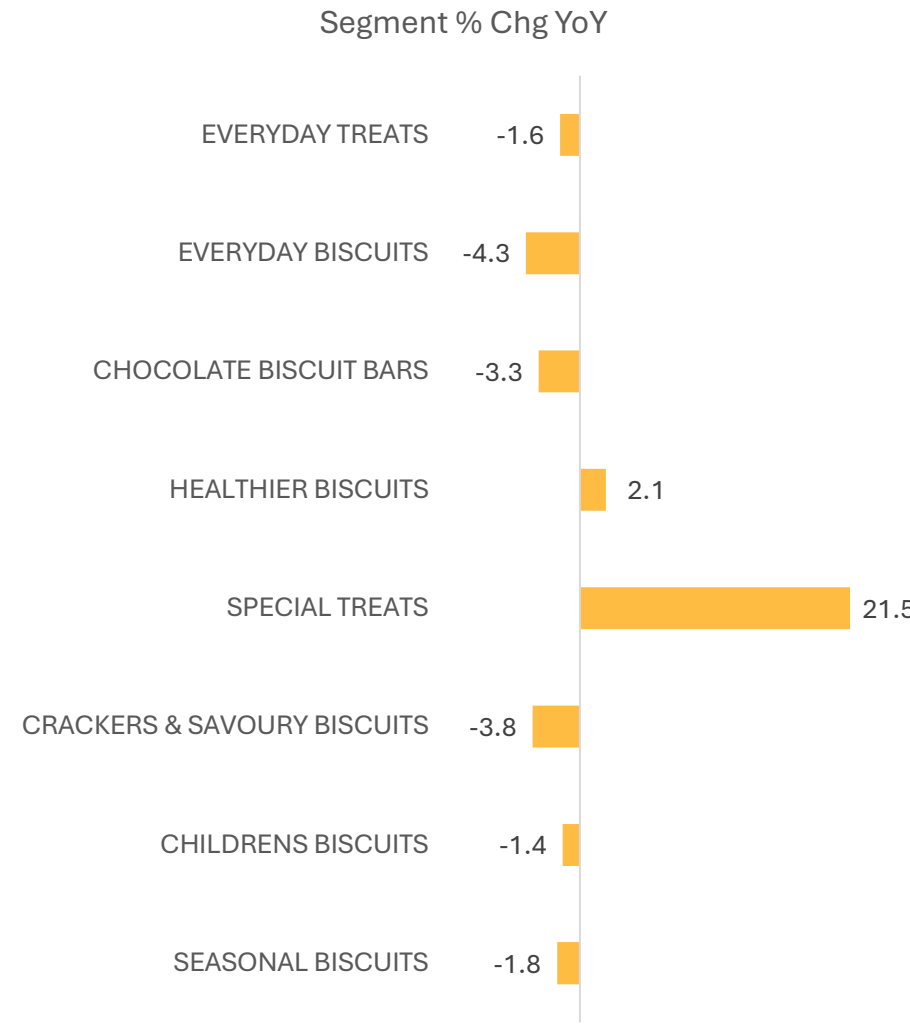
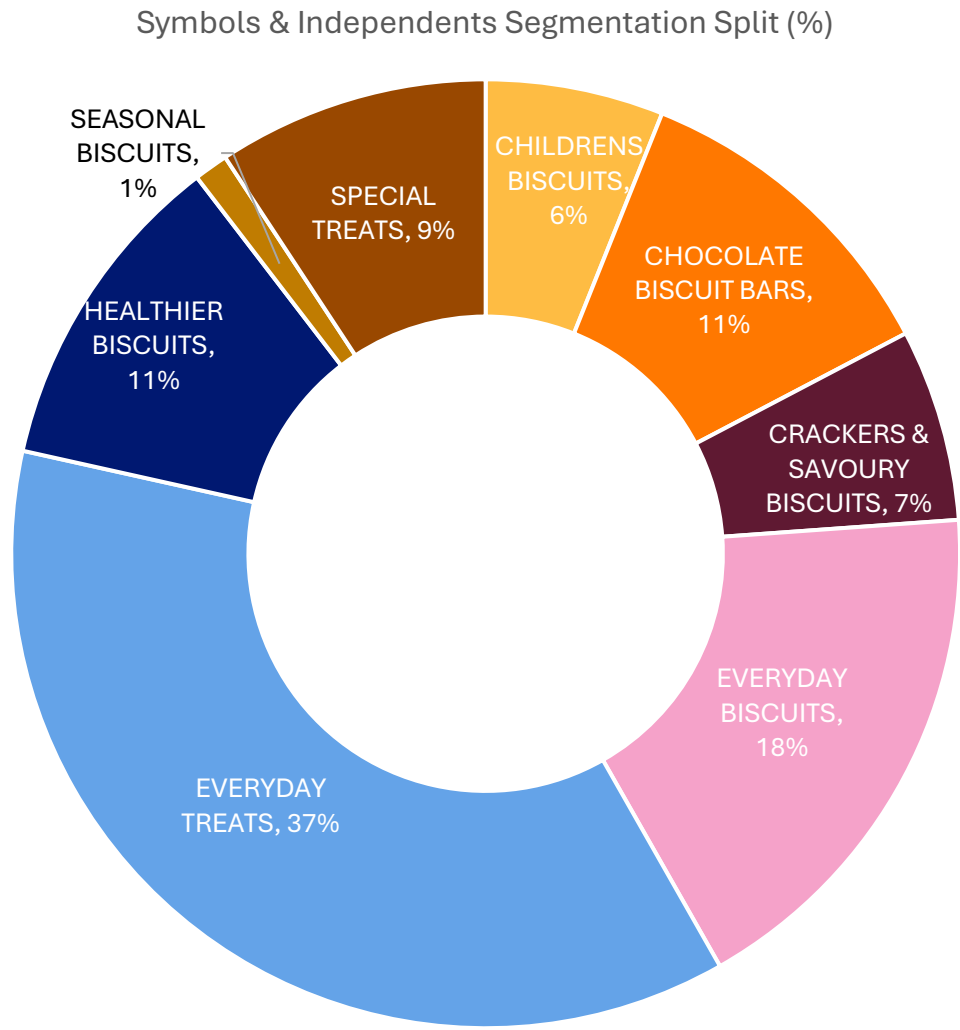
**Biscuits Frequency x50.8 a year**  
*(x30% more than Chocolate Confec)*

# It's worth £285m in Convenience and is largely made up of Everyday Treats and Biscuits, but seeing strong growth within Special Treats

**Total S&I Biscuits  
£285m**

**+2.3% growth YoY**

**Top 15 biscuit lines are worth £66m  
26% of total sales  
+Growing at 3.3%**



Source: Nielsen IQ Symbols & Independents L52W data w/e 14/03/26

# Top Products

# Best Selling Sweet Biscuits

This is a category that is seeing impressive growth +4.4% in latest 12 weeks. With over 4700 lines, ensure that you stock up on the bestsellers to maximise growth in this snacking category!

1 MCVITIES CHOCOLATE DIGESTIVES MILK CHOCOLATE 266G



2 KIT KAT MILK CHOCOLATE 20.7G X 6 PACK



3 MCVITIES JAFFA CAKES DARK CHOCOLATE & ORANGE 110G



4 PRIVATE LABEL BOURBON CREAM CHOCOLATE 400G



5 OREO COOKIES DOUBLE CREME 157G



6 CADBURY FINGERS MILK CHOCOLATE 114G



7 MCVITIES CHOCOLATE HOBNOBS MILK CHOCOLATE 262G



8 BISCOLATA MINI BISCUITS CHOCOLATE & HAZELNUT 100G



9 MARYLAND COOKIES CHOC CHIP 200G



10 MCVITIES DIGESTIVES PLAIN 360G



11 CADBURY TIMEOUT WAFER MILK CHOCOLATE 18 G X 6 PACK



12 PRIVATE LABEL CUSTARD CREAM CUSTARD 400G



13 OREO COOKIES VANILLA 154G



14 CADBURY CRUNCHY MELTS CHOCOLATE CENTRE 156G



15 PRIVATE LABEL COOKIES CHOCOLATE CHIP 200 G X 2 PACK

16 TUNNOCKS CHOCOLATE WAFER CARAMEL WAFER 30G X 4 PACK



17 MCVITIES CHOCOLATE DIGESTIVES DARK CHOCOLATE 266G



18 TUNNOCKS TEACAKES MALLOWS 144G



19 MARYLAND S'WICH CHOC CREME 150G



20 MCVITIES RICH TEA PLAIN 300G



# Best Selling Savoury Biscuits

Savoury Biscuits is worth £682m in Total Market, and has value of £17m in Convenience, worth 6% of Total Biscuits category sales. With a diverse range of products that satisfy many shopper missions, stock up now to take advantage of this momentum!

1 RITZ CRACKERS ORIGINAL 150G



2 JACOBS CREAM CRACKERS PLAIN 300G



3 TUC SANDWICH ORIGINAL 150G



4 JACOBS CHEDDARS ORIGINAL 150G



5 PRIVATE LABEL CREAM CRACKERS PLAIN 300G



6 JACOBS BITES MATURE CHEDDAR & CARAMELISED ONION 125G



7 TUC CRACKERS ORIGINAL 150G



8 JACOBS CREAM CRACKERS PLAIN 200G



9 JACOBS BITES SMOKED PAPRIKA 125G



10 MARETTI BRUSCHETTE CHIPS SLOW ROASTED GARLIC 70G



11 MARETTI BRUSCHETTE TOMATO OLIVE & OREGANO 70G



12 RYVITA CRISPBREAD ORIGINAL 200G



13 RYVITA CRISPBREAD DARK RYE 200G



14 MARETTI BRUSCHETTE PIZZA 70G



15 PRIVATE LABEL CHEESE TWISTS 125G



16 MARETTI BRUSCHETTE CHIPS SOUR CREAM & ONION 150G



17 MARETTI BRUSCHETTE MEDITERRANEAN VEGETABLES 70G



18 TOOTY FRUITY CRACKERS CHILLI 100G



19 RYVITA CRACKERBREAD ORIGINAL 125G



20 PRIVATE LABEL BLACK PEPPER & SEA SALT CRACKRS 185G



# Best Selling On-The-Go Snacks

On-The-Go Sweet Biscuits are a popular treat in the convenience sector, now £189m in Total Market, growing at +1.9%. Stock up on customer favourites to further this growth!

1 LU MIKADO & GO! MILK CHOCOLATE 39G



2 KINDER CARDS WAFERS COCOA & MILK CHOCOLATE 25.6G



3 MCVITIES CLUB LAYERS CHOCOLATE & ORANGE 39G



4 FLIPZ PRETZELS MILK CHOCOLATE 80G



5 KELLOGGS RICE KRISPIES SQUARES TOTALLY CHOCOLATEY 36G



6 NUTELLA & GO! CHOCOLATE & HAZELNUT 48G



7 KELLOGGS RICE KRISPIES SQUARES MARSHMALLOW 28G



8 KELLOGGS RICE KRISPIES SQUARES CARAMEL & CHOCOLATE 36G



9 KP CHOC DIPS MILK CHOCOLATE 28G



10 KELLOGGS NUTRI-GRAIN STRAWBERRY 37G



11 FLIPZ PRETZELS SALTED CARAMEL 80G



12 SESAME SNAPS SESAME 30G



13 MCVITIES GOLD BILLIONS WAFER GOLDEN CARAMEL & CHOCOLATE 39G



14 BISCOLATA STIX MILK CHOCOLATE 34G



15 CADBURY SNACKS SHORTCAKE SHORTCAKE 40G



16 MCVITIES GOLD BILLIONS WAFER CHOCOLATE & HAZELNUT 39.5G



17 BELVITA SOFT BAKES CHOC CHIPS 50G







# Biscuits and Crisps & Snacks Category Review

March 2026

# In a hurry?

| Market/Category  | Insights   | Actions  |
|--|--|--|
|   | <ul style="list-style-type: none"> <li>Biscuits performance in S&amp;I continues to underperform vs. the rest of the retail landscape. Strong growth seen in Grocery Mults as growth through their OTG biscuits offering and strong promo support on core branded lines.</li> <li>Less shoppers in Convenience with product spent being driven by ARP increases and frequency. Smaller trips containing more expensive products vs. yr ago.</li> <li>Maturing innovation / lapping NPD 2025 and PPA changes/delists has caused unit decline. We are not seeing sales mopped up by core range.</li> <li>Special Treats is helping to drive value sales, as shoppers still seek indulgent impulse treats when shopping in Convenience. Everyday Treats and CBBs struggle.</li> </ul> | <ul style="list-style-type: none"> <li>To grow baskets of existing customers, <b>focus on tapping into different missions</b> within the biscuits range to <b>encourage larger and heavier spend per visit</b>.</li> <li>For convenience to win back shoppers, <b>ensure execution on Core and NPD is maximised. Promos and visibility</b> are key to encourage impulse purchases.</li> <li><b>Support Everyday Treats and CBBs</b> best sellers range as important to overall sales and help to tap into different missions.</li> </ul> |
|  | <ul style="list-style-type: none"> <li>Opposite trend to Biscuits where Convenience continues to outperform Grocery Mults. But all driven by ARP increases, leaving units in decline. Softer decline vs. Grocery.</li> <li>Challenger Barcel USA contributing through NPD and ranging. Also KP with Discos, and Tayto benefit with continuation of innovation with bold variants.</li> </ul>   | <ul style="list-style-type: none"> <li><b>Prioritise innovation big bets</b> as likely to contribute strongly to unit growth as drive incremental occasions and impulse pick up.</li> <li><b>Secondary displays and promotional bays</b> are key to driving penetration and frequency of C&amp;S.</li> </ul>   |



# Market Insight & Convenience Trends

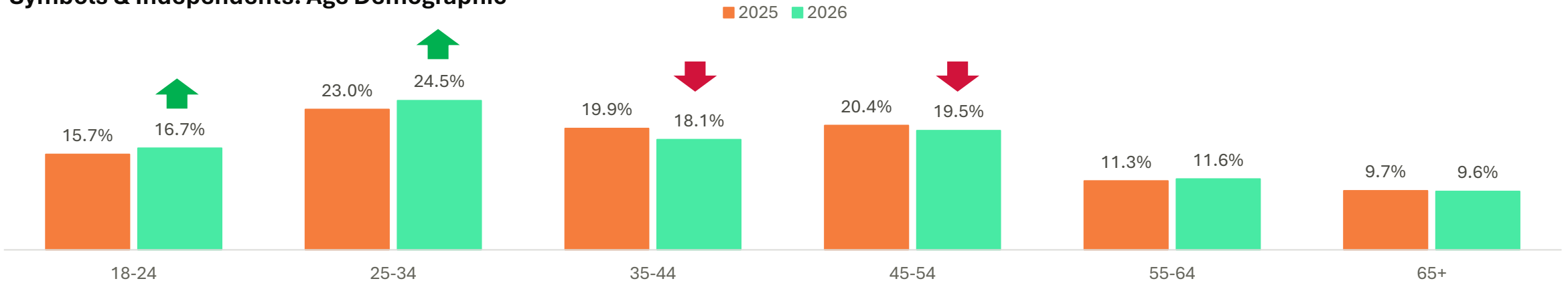
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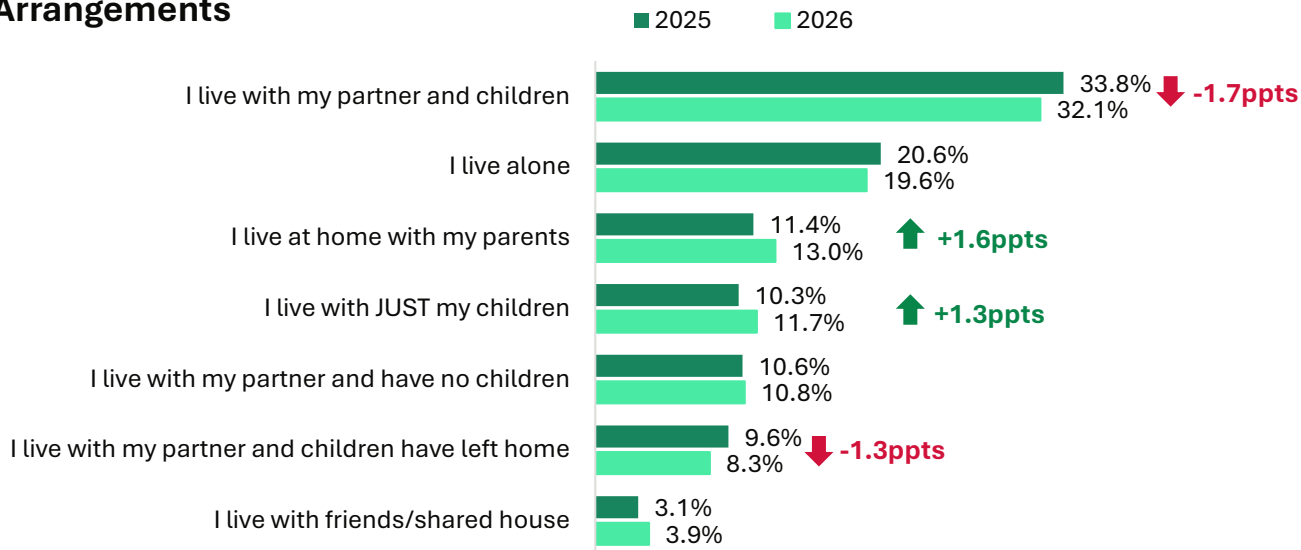
# DEMOGRAPHICS DYNAMICS:

S&I growth driven by younger, value-focused shoppers. Daytime meals and snacking can help to boost baskets and frequency when in-store. Invest in different missions and innovation to give consumers more reasons to visit.

## Symbols & Independents: Age Demographic



## Living Arrangements



## Gender



| Year | Male (%) | Female (%) |
|------|----------|------------|
| 2025 | 50%      | 49%        |
| 2026 | 48%      | 51%        |

## Social Grade

| Year | ABC1 (%) | C2DE (%) |
|------|----------|----------|
| 2025 | 54%      | 46%      |
| 2026 | 51%      | 49%      |



## **POWER OF SEASONAL PRESENCE:**

**Promotional activity increased as retailers rolled out seasonal campaigns aimed at in-home celebrations while maintain strong value. Despite this PMP is still growing during festive periods**

### **Flavours Innovation / Limited Editions**

- Limited editions are a great footfall driver, attract new shoppers and drive incrementality
- They capture attention and drive impulse purchases



### **Promotions to compete for spend with Grocery**

- Support strong value offering / PMPs to drive trial.
- Think about baskets and missions in terms of multibuy and cross-category link ups
- Front-of-store activation to capture early shopper attention and encourage impulse purchase with festive messaging



Think about how you can tap into Easter, Father's Day and Summer Sporting Events within Impulse categories



# Biscuits Performance Market Review

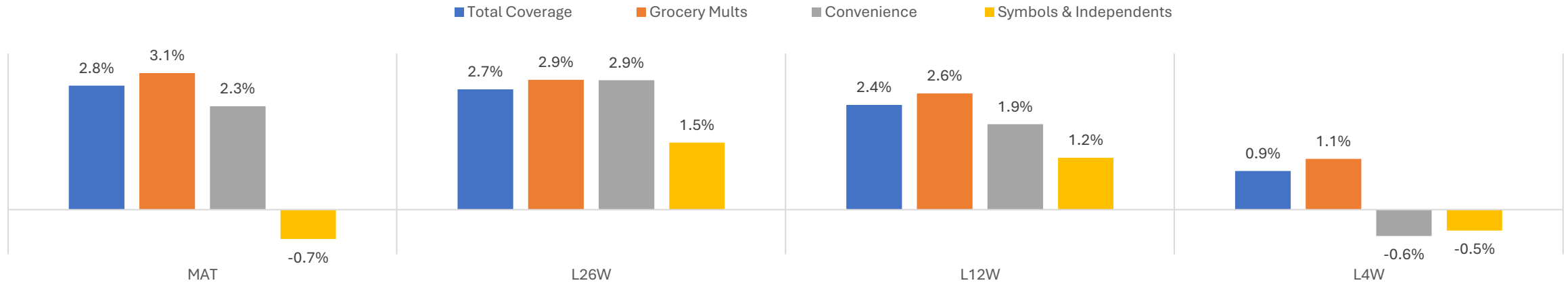


Data source: Nielsen Discover Symbols & Independents 28/02/26

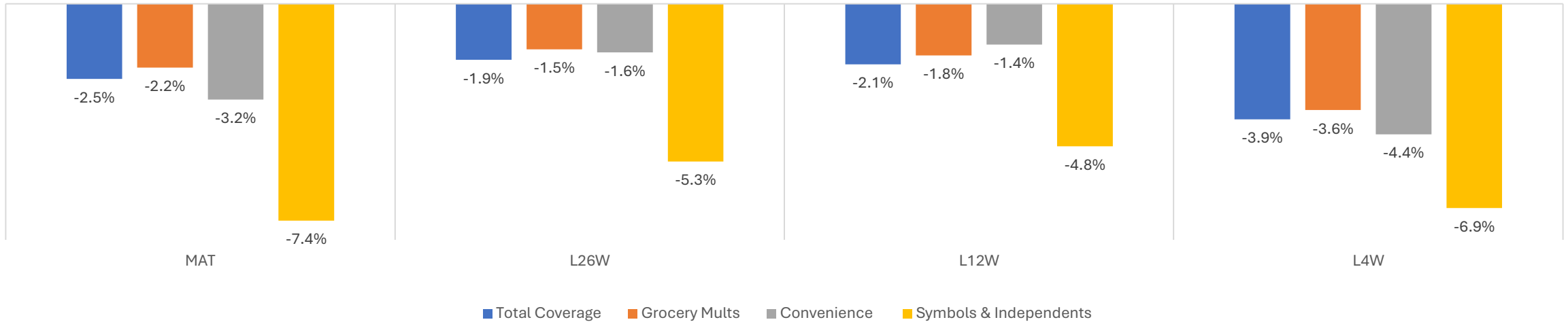


# Biscuit Category growth driven by inflation. Unit decline across the board, with S&I now tipping into the latest 4wks to behind Grocery

### Biscuits Value % Change by channel



### Biscuits Units % Change by channel



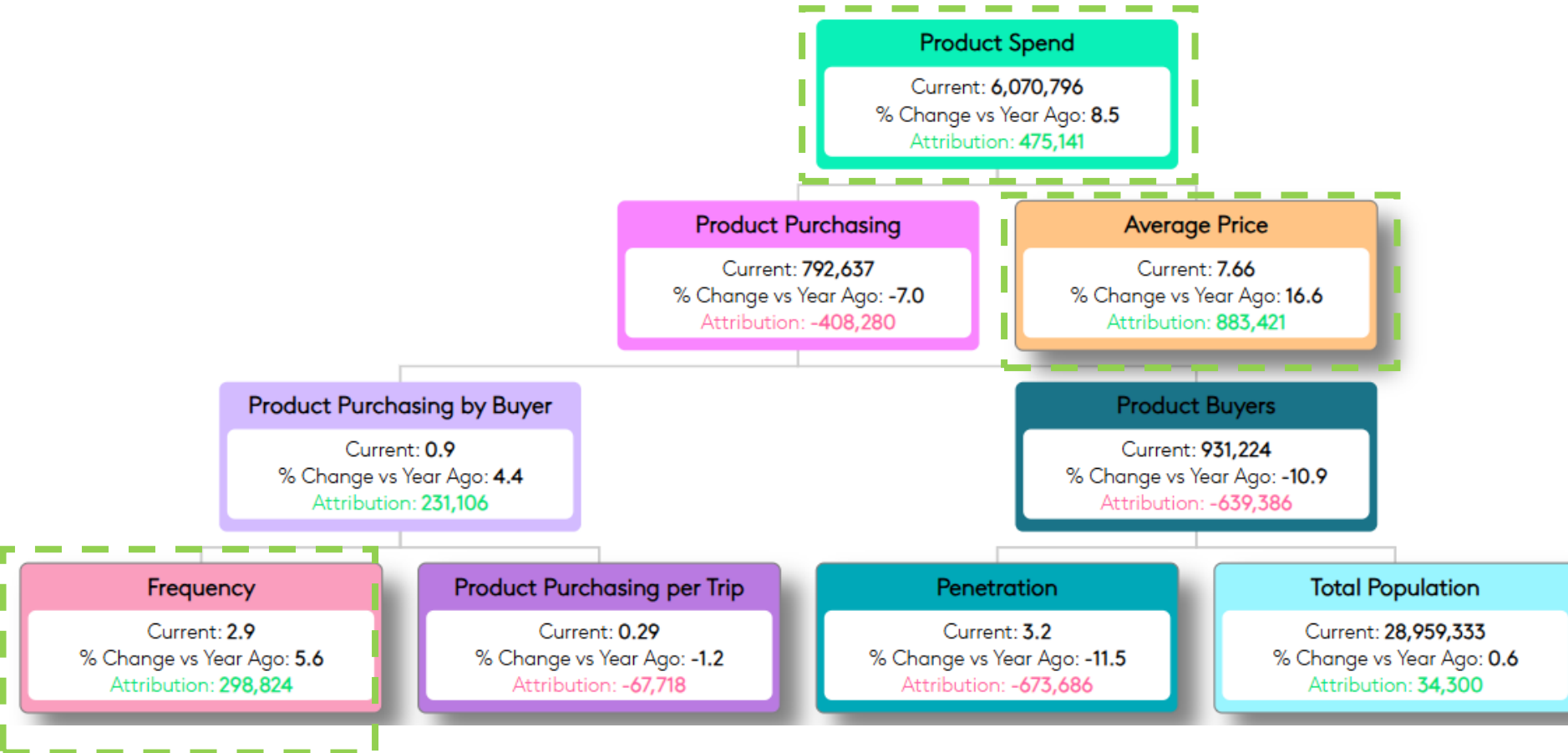


Looking at the latest 12 weeks, Convenience see less Biscuits but this has been offset by higher frequency and higher average selling prices driving category spend up

## So what?

Focus on tapping into different missions within the Biscuits range to encourage bigger baskets of existing shoppers

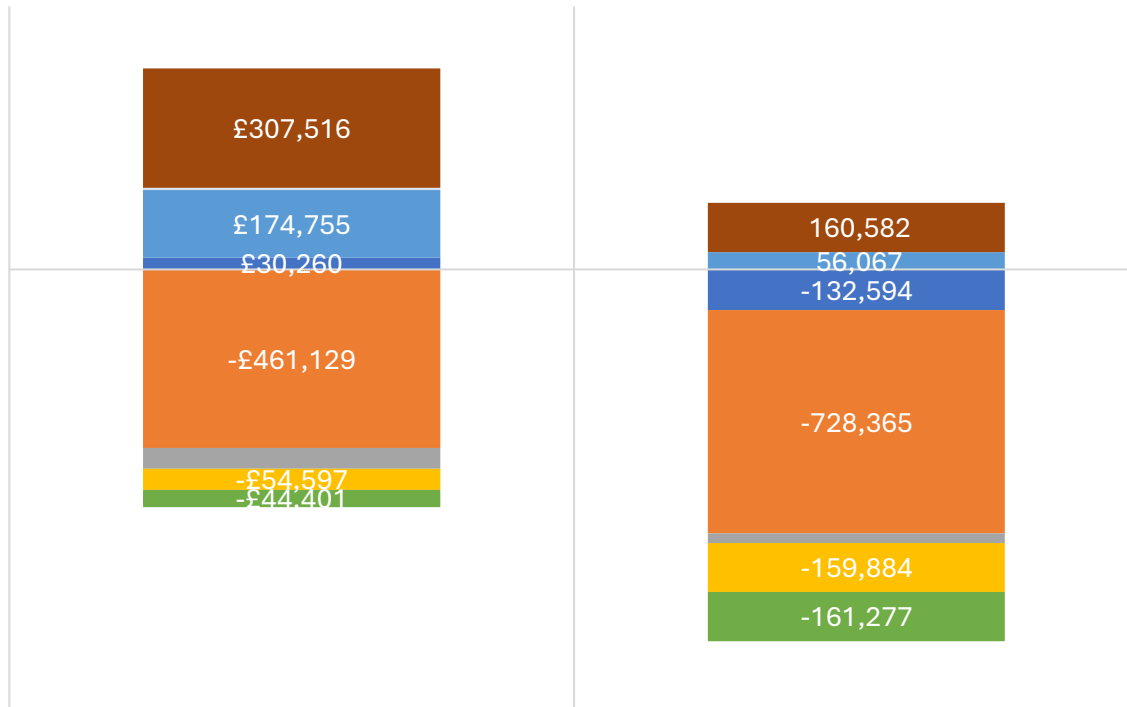
Can do this through pack formats, innovation and compelling promos





# Special Treats remain top-performing subcategory, with Everyday Treats also contributing to unit growth. New Oreo Cream Egg limited edition NPD alongside Maryland cookies and Cadburys fingers delivering growth. Gold Billions bars lap with chocolate & Hazelnut launch activity

Biscuits subcategory contribution to change



L4W Value

L4W Units

- CHILDRENS BISCUITS
- CRACKERS & SAVOURY BISCUITS
- EVERYDAY TREATS
- SEASONAL BISCUITS

- CHOCOLATE BISCUIT BARS
- EVERYDAY BISCUITS
- HEALTHIER BISCUITS
- SPECIAL TREATS

## Top 3 Drivers L4W



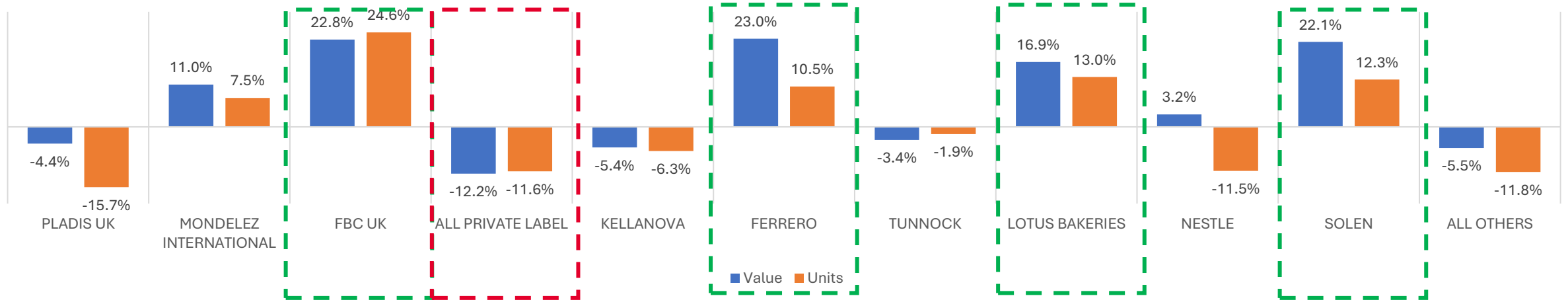
## Bottom 3 Drainers L4W



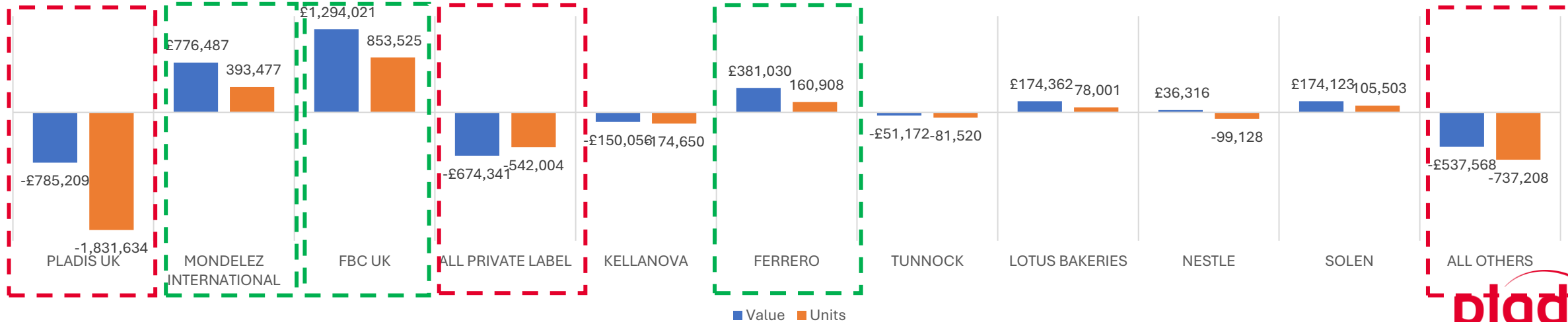


# Ferrero and Mondelez still delivering the greatest value & volume growth. Pladis volume remains in decline along with private label seeing softer performance. Lotus continue to grow at pace with increased distribution

Top 10 manufacturers (ranked by value) % change vs YA, S&I, L12W



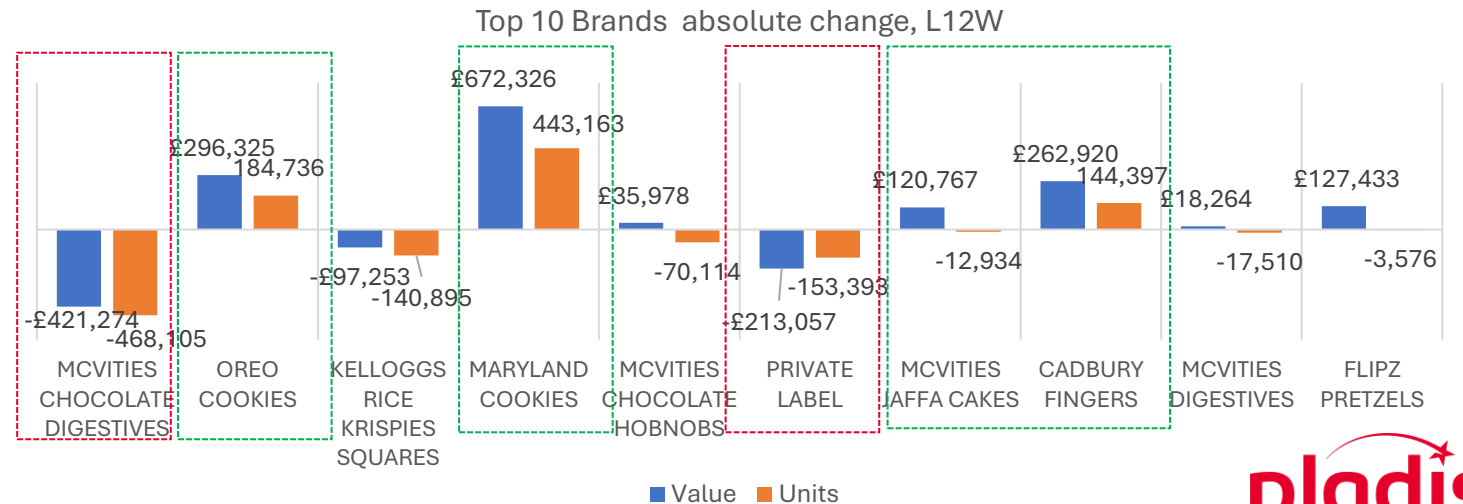
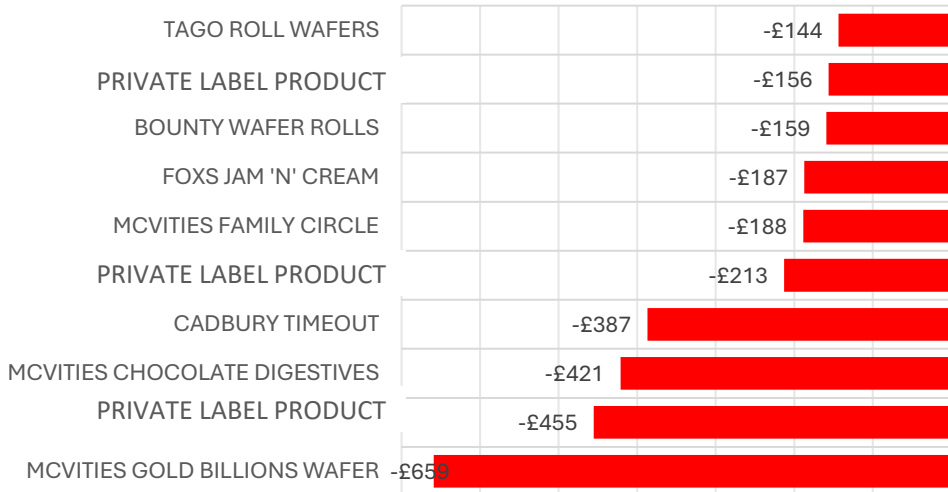
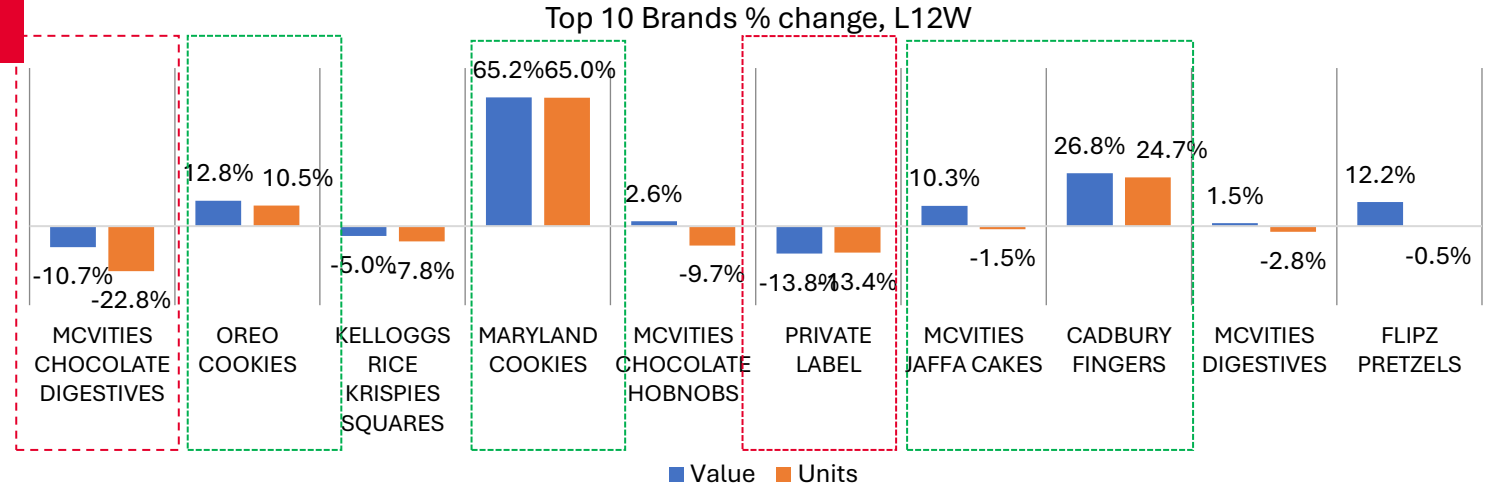
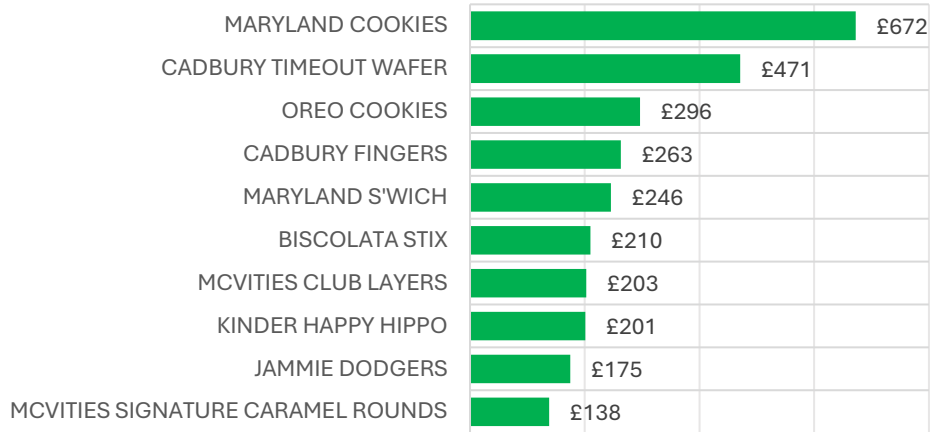
Top 10 manufacturers (ranked by value) absolute change vs YA, S&I, L12W















# Maryland cookies is the standout performer in the L12wks, delivering £672k of value growth. Oreo cookies delivers the second biggest growth in absolute terms followed by Cadbury's fingers and McVitie's Jaffa cakes

## Top & Bottom 10 Brands Contribution to Growth (£000)





# Innovation continues to fuel growth led by Oreo Crème Egg Maryland S'wich and Club layers. McVitie's Gold billions continues to lap January Launch of Billions Chocolate & Hazelnut

|   |   |  |          |   |   |   |          |
|---|---|--|----------|---|---|---|----------|
| 1 |    | Oreo Crème Egg                                 | +£248.0k | 1 |    | McVitie's Gold Billions Wafer Caramel & Chocolate | -£330.2k |
| 2 |    | Maryland S'wich                                | +£245.9k | 2 |    | McVitie's Gold Billions Chocolate & Hazelnut      | -£328.8k |
| 3 |    | McVitie's Club Layers                          | +£202.9k | 3 |    | McVitie's Golden Caramel Digestives               | -£241.1k |
| 4 |   | McVitie's Pink Digestives (Raspberry & Cream)  | +£140.0k | 4 |   | Bounty Wafer Roll                                 | -£156.0k |
| 5 |  | McVitie's Signature Milk Choc & Caramel Rounds | +£124.3k | 5 |  | Twix Wafer Roll                                   | -£96.1k  |